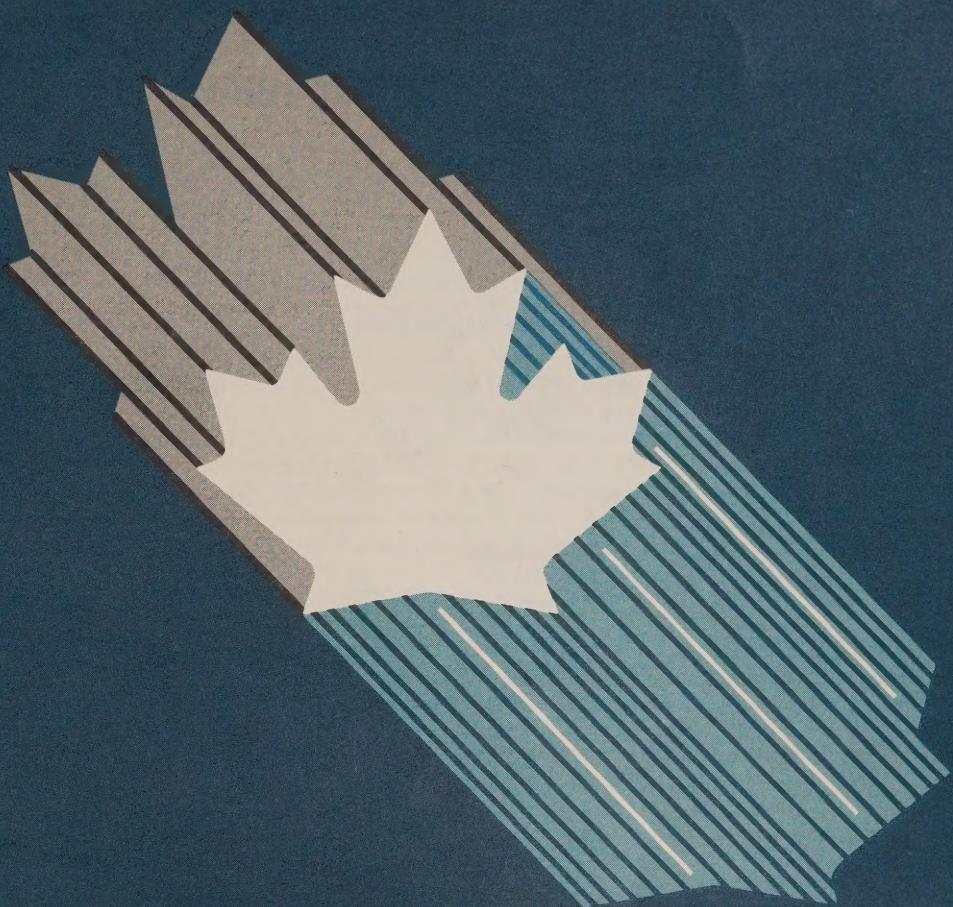


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INDUSTRY
PROFILE

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Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada

Materials Handling Equipment

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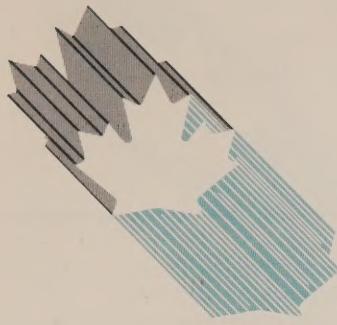
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INDUSTRY

PROFILE

MATERIALS HANDLING EQUIPMENT

1988

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FOREWORD

• • • • •

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to survival and growth. This Industry Profile is one of a series of papers which assess, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological and other key factors, and changes anticipated under the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the papers.

The series is being published as steps are being taken to create the new Department of Industry, Science and Technology from the consolidation of the Department of Regional Industrial Expansion and the Ministry of State for Science and Technology. It is my intention that the series will be updated on a regular basis and continue to be a product of the new department. I sincerely hope that these profiles will be informative to those interested in Canadian industrial development and serve as a basis for discussion of industrial trends, prospects and strategic directions.

Minister

Canada

1. Structure and Performance

Structure

The materials handling equipment industry consists of manufacturers of machinery and systems designed to transfer people and/or to lift, convey and position various materials or items from one location to another. There are 106 manufacturers in Canada, and total direct employment is approximately 7000. Manufacturing facilities are located primarily in Ontario, which also accounts for 57 percent of employment, followed by the Prairies with 20 percent of employment, Quebec with 14 percent, British Columbia with eight percent and the Atlantic region with one percent.

Industry shipments in 1986 totalled \$1.2 billion in value, including \$328 million worth of exports which were sold mainly to the United States. Ownership is largely by U.S. multinational enterprises which established subsidiaries for the domestic market in the 1950s when the Canadian tariff rate was relatively high (between 22 and 25 percent). Corporate concentration is highest in the manufacture of elevators and industrial lift trucks.

The industry can be divided into four distinct sub-sectors: *conveyors and handling systems* (20 percent of total shipments); *cranes and hoists* (27 percent); *industrial lift trucks and attachments* (18 percent); and *elevators* (35 percent).

The *conveyors and handling systems* sub-sector includes belt conveyors, stacker-reclaimers, shiploaders, feeders, pneumatic conveyors and radial stackers, all of which are used for the transportation of goods in bulk and in resource industry applications; and belt conveyors, roller conveyors, overhead chain conveyor systems, wire mesh conveyors, automated storage-retrieval systems and palletizers, all used in unit handling applications. The *cranes and hoists* sub-sector includes overhead travelling bridge cranes, jib cranes, gantry cranes and winches, all used in lifting or pulling operations. The *industrial lift trucks and attachments* sub-sector includes pneumatic tire counterbalanced forklifts, motorized pallet trucks, telescopic boom-type lift trucks, hand trucks and fork attachments, all used in the pickup and transfer of payloads by forklift. The remaining sub-sector, *elevators*, includes gearless machines, geared machines and hydraulic units, all for use in the vertical transfer of passengers or freight.

Performance

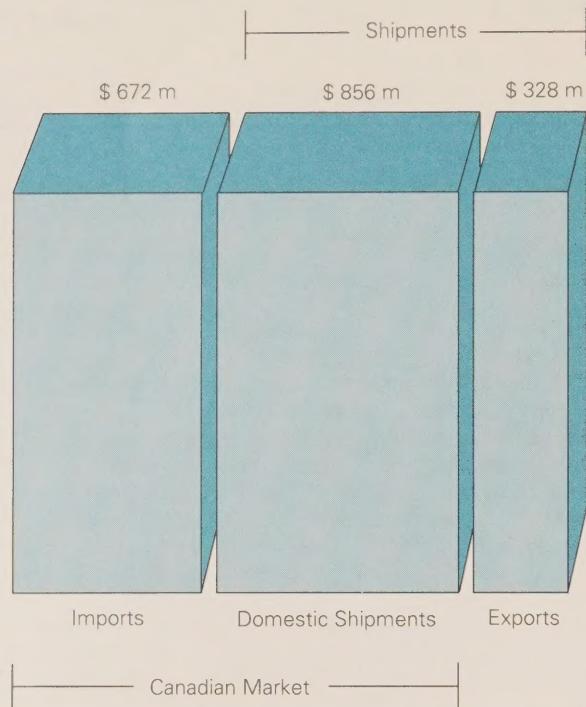
This mature industry has undergone significant restructuring in North America as a result of the economic recession of the early 1980s. The restructuring involved a downsizing of production facilities and a new emphasis on productivity in a highly price-competitive market.

The real growth rate in shipments of materials handling equipment has averaged 2.5 percent over the past decade, but has been cyclical in nature. A sizable decline in shipments in 1983 was attributable to the worldwide recession. As a result, the industry became very aware of its cost competitiveness and began to increase efficiency and close down non-essential production capacity. Most firms experienced layoffs at both the management and worker levels. Cost cuts also were achieved by adopting new production techniques such as just-in-time inventory control, computer-aided design and production automation.



Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada



*Imports, Exports and Domestic Shipments 1986**

* Estimate

A number of firms closed manufacturing operations in Canada in the 1980s, the most prominent being Otis Canada Inc. (a manufacturer of elevators), Caterpillar of Canada Ltd. and Hyster (industrial forklifts) and Harnischfeger (cranes). Foreign-owned subsidiaries, with the responsibility for marketing and engineering and with a product mandate, tended to perform better in this period, becoming more efficient and increasing exports.

Overall, the industry is now performing well. In the 1986-87 period, it was generally profitable, with a median net profit-to-sales after tax of 5.3 percent, on a gross margin of 19.1 percent.

The following provides a detailed examination of sub-sector performance.

The *conveyors and handling systems* sub-sector had shipments worth \$237 million in 1986. There are approximately 65 firms in the sub-sector, which are dominated by subsidiaries of U.S.-owned multinationals. The sub-sector is diverse, encompassing a large number of products requiring a high degree of system engineering by both the manufacturer and the customer. Product quality is of prime concern, as this machinery is required to move material continuously from one point to another without significant downtime.

The sub-sector is broadly divided into products for unit handling and bulk handling applications. Recently, market demand has been strong for unit handling conveyors such as those used in automotive, industrial warehousing and other secondary industries. However, demand has been slow in bulk handling conveyors such as those used in mining and port handling systems.

Trade is not significant to the *conveyors and handling systems* sub-sector. Service considerations require a local presence and, therefore, manufacturing facilities tend to serve a limited geographic market area. Subsidiaries of U.S.-owned multinationals in Canada generally have not been allowed to supply the U.S. market from Canadian plants. Exceptions to this are the large, complex conveyor systems that are custom-engineered and those made for markets in developing countries. These projects attract world competition from firms with established track records. Several Canadian firms have international capabilities in this area.

There are approximately 25 firms in the largely Canadian-owned *cranes and hoists* sub-sector, which had shipments worth \$319 million in 1986. It is dominated by 15 companies which have a well-established manufacturing base in custom-engineered products, such as industrial bridge cranes and gantry cranes, and in some of the more standard items including vehicle-mounted cranes. Smaller firms specialize their production in such areas as crane carriers, hydraulic winches and lift platforms.

Canada does not manufacture a complete range of crane and hoist machinery. Nonetheless, the Canadian capability has proved to be internationally competitive, especially in the areas of heavy-duty bridge cranes, vehicle-mounted cranes and hydraulic winches. Imports tend to be in product areas not manufactured in Canada, primarily for construction, such as tower cranes, crawler cranes and all-terrain hydraulic cranes.

Demand for cranes and hoists has grown slowly in the past 10 years, and the industry does not anticipate good market growth in the near-to-mid-term, particularly for custom-designed cranes. The North American infrastructure is mature. Even where cranes and hoists have been required — such as in industrial plants, powerhouses and steel mills — markets are growing slowly. Crane and hoist products have also faced competition from alternate machinery products such as robots and conveyors. Despite the closing of several major plants in the past 10 years, there is still overcapacity and firms are diversifying their production into other heavy-duty fabrication areas.



The Canadian *industrial lift trucks and attachments* sub-sector consists of 15 firms in narrowly defined product areas such as rough-terrain forklifts, narrow-aisle stackers and pallet trucks. In 1986, shipments from this sub-sector totalled \$216 million in value. The production of lift trucks has undergone a period of major restructuring, primarily in reaction to the highly competitive environment created by major Japanese manufacturers' penetration of the North American market. During the 1983-86 period, several North American plants of U.S.-owned multinationals were closed and manufacturing shifted to offshore, low-cost locations. Remaining firms rationalized their production to achieve higher volumes for the North American market.

The *elevators* sub-sector, which had shipments worth \$414 million in 1986, is having to adjust to an overall smaller market. Shipments in the sub-sector are directly related to growth in the North American building stock. In addition, manufacturers have increasingly looked to service and maintenance work to retain profitability. The six Canadian manufacturers have efficient operations which offer a complete range of elevator products. Otis Elevator, which was the sub-sector's largest manufacturer, closed its Canadian plant in 1987 as part of a corporate downsizing. However, Otis continues to serve the Canadian market through its established installation and service network.

Micro-electronic technology has had a major impact and Canadian firms have developed their own elevator control packages. The high safety and performance standards required in the installation of elevators necessitates a domestic manufacturing presence and, therefore, with the exception of Otis, trade is limited.

2. Strengths and Weaknesses

Structural Factors

The strengths of this diverse industry include its well-equipped manufacturing facilities, which employ modern production processes; its stable costs for materials and labour, which are competitive with North American locales; its access to U.S. technology; and its excellent custom-engineering capabilities. Nevertheless, economies of scale remain a continuing concern, particularly for forklifts and conveyors.

Because the industry is dominated by subsidiaries of U.S.-owned multinationals whose autonomy is generally restricted, only limited research and development is conducted in Canada. Further, in common with other machinery industries, Canadian firms have had an ongoing problem with attracting and maintaining skilled labour.

The key factors influencing competitiveness in the *conveyors and handling systems* sub-sector are proven experience and quality. Industrial capability in Canada ranges from basic gravity-roller conveyors to highly automated conveyor systems. The strengths of this sub-sector include its well-equipped manufacturing facilities; its excellent system engineering; and its competitive marketing expertise. Production is job-shop oriented and considered efficient by North American standards. Manufacturers of conveyors and handling systems have an efficient supplier base for materials such as steel, conveyor belting and drive motors.

A weakness of the sub-sector is that Canadian plants have not invested in new product development. The market has increasingly demanded goods, such as automated guided vehicles or electrified monorail systems, which Canadian firms do not currently manufacture. Automation, including computer controls, linear induction motors and robotics, will grow in the future and Canadian firms may have difficulty keeping pace with this technology unless more resources are committed to R&D.

Manufacturers in the *cranes and hoists* sub-sector have an excellent capability in custom-designed products. Their strengths include substantial heavy-duty manufacturing facilities; world-class machining capabilities; a well-established reputation for quality custom design, particularly for overhead bridge cranes and heavy-duty winches; and a solid supplier base for such items as steel, gears and hydraulic cylinders. There is some specialization in more standard production of utility cranes, lift platforms, hydraulic winches and crane carriers.

With the exception of utility cranes and winches, the sub-sector does not manufacture pre-engineered standard products which have recently increased their market share. As well, some Canadian manufacturers have not adapted themselves well to new product developments in such areas as automated cranes and overhead manipulators.

The strengths of the *industrial lift trucks and attachments* sub-sector include its modern assembly shop operations that use just-in-time inventory methods; its excellent design expertise in specialized classes of lift trucks; its stable and competitive supplier base; and its access to North American distribution channels. Of all the materials handling equipment sub-sectors, the development of product niches has been most successfully used in lift truck manufacturing. Most firms in Canada are competitive in the North American market, particularly for pneumatic tire rider units.

A major weakness of the sub-sector is that it does not achieve sufficient economies of scale to justify the production of power-train components.

The strengths of the elevators sub-sector include its modern production facilities, which operate efficiently, achieving satisfactory economies of scale in component fabrication; its solid reputation for safety; and its broad-based repair and replacement parts aftermarket. While advanced electronic components have been incorporated into this machinery, firms will have to invest further in electronic technology to keep pace. Also, a shortage of skilled labour in Canada will continue to affect production.

Trade-related Factors

The materials handling equipment industry has experienced a basic restructuring and adaptation to a more price-competitive environment which includes a declining tariff under the General Agreement on Tariffs and Trade (GATT). Present Most Favoured Nation (MFN) tariff rates for major market areas are shown in the following table:

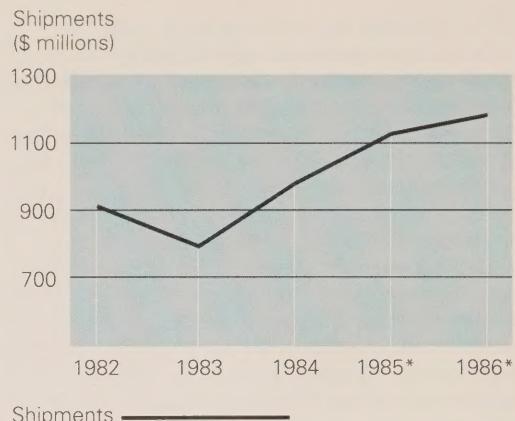
RANGE OF TARIFF RATES FOR MATERIALS HANDLING EQUIPMENT

Effective January 1, 1987

	(%)
Canada	9.2 - 9.3
United States	0.0 - 3.7
Japan	3.0 - 4.8
European Community	2.9 - 6.0

Non-tariff barriers (NTBs) are not an important factor in the North American market. Product safety and performance standards are almost identical in both countries and not a source of concern. However, significant NTBs do limit Canadian access to other markets. For example, in the European Community (E.C.) technical standards are often different and Canadian manufacturers have experienced difficulties in obtaining product certification. Similarly, Japanese product safety codes are more elaborate and involve a complicated processing procedure.

The Canada-U.S. Free Trade Agreement (FTA) will remove tariffs in this industry over a five-year period. The FTA also contains provisions to ease entry requirements of service personnel, which will increase the ability of Canadian firms to sell in the United States.



Shipments

Total Shipments

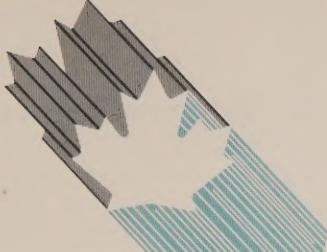
* ISTC estimate

Technological Factors

While research and development is not extensive in the industry, Canadian firms have a strong capability in custom-engineered products. Whereas Canadian subsidiaries of foreign-owned multinationals normally have access to the technology base of their parent company, Canadian-owned enterprises are faced with additional costs and risks for R&D and, therefore, tend to conduct smaller research projects. Firms also follow the innovations made in the United States as there is acceptance of U.S. technical standards and it is the largest export market. The use of electronic controls and more efficient modular designs continues to influence product development. Overall, there appears to be little progress in the Canadian industry to develop or acquire leading-edge technology.

3. Evolving Environment

Future trends in the materials handling equipment industry will continue to see a demand for specialized products, as well as greater automation and increasing sophistication in machine components. The industry will continue the trend of restructuring and adaptation to the mature market environment and the globalization of the marketplace. The development of new technology will become even more important to firms in Canada, now competing mainly with the United States and Japan, when they face the emerging competitors from the Republic of Korea, Taiwan and Brazil in the next 10 years.



Under the FTA, the critical element for this industry is the elimination of tariffs. Historically, Canada has had a comparatively higher tariff than the United States — a tariff which fostered Canadian production. The ability to custom engineer and specialize and the restructuring which has already occurred have placed the industry in Canada in a good position to develop North American sales. Phasing in the tariff elimination over five years should give the industry time to adjust to the terms of the agreement. There is a risk that some plant rationalization may occur where duplicate operations for multinational firms exist in both Canada and the United States. However, due to the restructuring which has already taken place, this is not seen as a significant problem.

Canadian-owned firms throughout the industry will need to develop strategies involving technology transfer, international licensing and joint ventures, and modern production methods in order to maintain their competitiveness. In particular, there is increasing competition from producers other than the United States, such as from Europe (for sophisticated materials handling systems) and from Asia (for price-competitive materials handling equipment). Competitive pressures from these areas are likely to intensify in the future. The proportion of imports from countries other than the United States rose from 12 percent in 1981 to 35 percent in 1986.

In the *conveyors and handling systems* sub-sector, the industry will involve itself increasingly with complex automation and the development of high-technology products such as robotic handlers, electrified monorails and automated guided vehicles. Increasingly, systems will have to meet the end users' requirements for just-in-time inventories, automated processing lines and computer-aided manufacturing.

In the *cranes and hoists* sub-sector, the development of various specialized products will continue under the FTA, with new opportunities anticipated in custom-designed cranes and winches. Because of the mature nature of the market, manufacturers in Canada compete in an aggressive international environment. However, with secured access to the U.S. market, the industry will have an opportunity to increase output.

In the *industrial lift trucks and attachments* sub-sector, intense international competition will continue; however the future of Canadian manufacturers will depend largely on their ability to provide specialized products for the world marketplace. The restructuring, which has already occurred, should position the industry to be more internationally competitive.

In the *elevators* sub-sector, the electronic revolution will continue to have an impact with the challenge to develop faster and more specialized units. Owing to the importance of local installations and service, the FTA is seen as having a limited impact on this product area.

4. Competitiveness Assessment

The materials handling equipment industry represents a broad range of machinery manufacturers. Overall, Canadian firms have a well-established capability to supply quality products in niche areas which fully meet internationally accepted engineering standards and are comparable to the best in other industrialized nations.

The major challenge will be to keep pace with the growing innovation in sophisticated, electronically controlled, automated machinery, particularly from the United States, Japan and the European Community. Further, the industry will have to shift its general orientation from the Canadian market and continue to develop internationally competitive products in order to meet the emerging competition from the Republic of Korea, Taiwan and Brazil.

Overall, the FTA will secure access to the North American market and allow firms to take advantage of their competitive strengths.

For further information concerning the subject matter contained in this profile, contact:

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Industry, Science and Technology Canada
Attention: Materials Handling Equipment
235 Queen Street
Ottawa, Ontario
K1A 0H5

(613) 954-3224

PRINCIPAL STATISTICS
SIC(s) COVERED: 3192 (1980)

	1973	1982	1983	1984	1985 ^e	1986 ^e
Establishments	70	106	100	102	105	106
Employment	N/A	N/A	N/A	N/A	N/A	7 000
Shipments (\$ millions)	266	905	799	979	1 124	1 184

TRADE STATISTICS

	1973	1982	1983	1984	1985 ^e	1986 ^e
Exports (\$ millions)	42	198	286	309	322	328
Domestic shipment (\$ millions)	224	707	513	670	802	856
Imports (\$ millions)	181	371	316	423	547	672
Canadian market (\$ millions)	405	1 078	829	1 093	1 349	1 528
Exports as % of shipments	16	22	36	32	29	28
Imports as % of domestic market	45	34	38	39	41	44
Source of imports (% of total value)		U.S.	E.C.	Asia	Others	
	1981	88	6	4	2	
	1982	85	8	4	3	
	1983	85	8	5	2	
	1984	78	11	8	3	
	1985	72	17	5	6	
	1986	65	18	9	8	
Destination of exports (% of total value)		U.S.	E.C.	Asia	Others	
	1981	63	7	3	27	
	1982	67	7	6	20	
	1983	71	5	5	19	
	1984	79	2	5	14	
	1985	90	1	3	6	
	1986	88	2	3	7	

(continued)



REGIONAL DISTRIBUTION — Most recent year available — 1984

	Atlantic	Quebec	Ontario	Prairies	B.C.
Establishments — % of total	3	18	44	23	12
Employment — % of total	1	14	57	20	8
Shipments — % of total	2	11	59	21	7

MAJOR FIRMS

Name	Ownership	Location of Major Plants
Rapistan Systems Limited (conveyors)	American	Rexdale, Ontario
Mathews Conveyor Company (conveyors)	British	Port Hope, Ontario
Stephens Adamson Limited (conveyors)	Swedish	Belleville, Ontario
Jervis B. Webb Company of Canada Ltd. (conveyors)	American	Hamilton, Ontario
John T. Hepburn Limited (cranes)	Canadian	Toronto, Ontario
Pitman Manufacturing Company Inc. (cranes)	Canadian	Toronto, Ontario
Raymond Industrial Equipment Limited (forklifts)	American	Brantford, Ontario
Sellick Equipment Ltd. (forklifts)	Canadian	Windsor, Ontario
Dover Corporation Canada Ltd. (elevators)	American	Toronto, Ontario
Schindler Elevator Corporation (elevators)	American	Pickering, Ontario

e ISTC estimate
N/A Not available

Note: Statistics Canada data have been used in the preparation of this profile.



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PRINCIPALES STATISTIQUES

CTI 3192 (1980)

STATISTIQUES COMMERCIALES						
Expéditions*	266	905	799	979	1 124	1 184
Emplois	n.d.	n.d.	n.d.	n.d.	n.d.	7 000
Établissements	70	106	100	102	105	106
1973 1982 1983 1984 1985e 1986e						

Source des importations (en %)						
Destination des exportations (en %)						
Importations (en % du marché intérieur)	45	34	38	39	41	44
Exportations (en % des expéditions)	16	22	36	32	29	28
Marché intérieur*	405	1 078	829	1 093	1 349	1 528
Importations*	181	371	316	423	547	672
Expéditions intérieures*	224	707	513	670	802	856
Exportations*	42	198	286	309	322	328
1973 1982 1983 1984 1985e 1986e						

Materiel de transport de surface et machine
Industrie, Sciences et Technologie Canada
Objet : Materiel de manutention

Pour de plus amples renseignements sur ce dossier, s'adresser à :

Dans l'ensemble, l'accès au marché entreprises de cette industrie, grâce à la grande demande nord-américaine et leur permettra de tirer parti de leurs atouts.

Cette industrie canadienne regroupe un vaste éventail de constructeurs. Dans l'ensemble, ceux-ci devraient très bien répondre à la demande de certains crénau, car leurs produits répondent aux normes internationales d'ingénierie et se comparent à un niveau des innovations réalisées aux Etats-Unis. Pour cette industrie, le principal défi consistera à améliorer l'efficacité et la qualité de ses produits et à développer des partenariats avec d'autres pays industriels au Japon et dans la CEE dans le domaine des appareils complexes et automatisés, commandes électroniques. De plus, cette industrie devra intéresser aux marchés étrangers et continuer à mettre au point des produits compétitifs afin de maintenir la concurrence vive par la Corée du Sud, Taïwan et le Brésil.

4. Evaluation de la compétitivité

Ce sous-système continuera de sentir les effets de la révolution électronique et devra mettre au point des appareils plus rapides et plus précis que ceux qui ont donné l'importance d'une présence locale. Etant donné l'importance d'une présence locale, l'accord ne devrait guère servir après-venu. Le toucher ce sous-système.

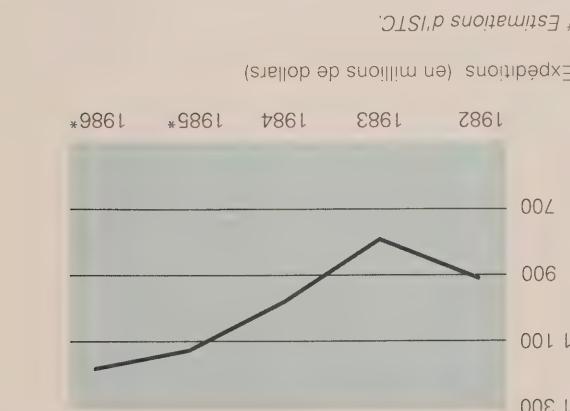
Dans ce sous-secteur, la concurrence étrangère devrait s'intensifier, ce qui dépendra en grande partie de leur capacité canadienne à innover et à développer des fabricants canadiens dépendant, au contraire, de leur capacité à offrir des produits spéciaux sur les marchés étrangers. Par suite de la rationalisation dont il a fait l'objet, ce sous-secteur devrait être plus compétitif sur le plan international.

Grues et palans

Ce sous-secteur s'occupe de la maintenance et du matériel de convoyeurs. Les produits de haute technologie comme les robots-manipulateurs, les monorails électriques et les véhicules à guidage automatique sont les plus importants. Les applications les plus courantes sont dans les industries manufacturières, les magasins de détail et les entrepôts. Les systèmes de stockage au moment dépendent de chaînes de fabrication automatisées et de la logistique. Les produits de ce secteur sont destinés à faciliter la production et à réduire les coûts de fabrication.

éventuelle ne semble guère critique. Pour rester compétitives, les entreprises de propriété sondadienne devront adapter des plans d'action favorisant le transfert de la technologie, la conclusion d'accords de licence et de création d'entreprises et le recours à des méthodes modernes d'entreprise et le recours à des méthodes modernes d'entreprise. Ces industries se voit livrer une concurrence de plus en plus vive par les constructions européennes, pour les appareils complexes de maintenance, et les établissements, pour les appareils d'exemple, la part des importations provenant d'autres pays que les Etats-Unis est passée de 12 à 35 p. 100 de 1981 à 1986.

3. Evolution de l'environnement



Estimations disc.

Expéditions (en millions de dollars)

! Accord contentant des dispositions visant à faciliter les déplacements du personnel chargé de l'entretien, ce qui accordera la capacité des entreprises canadiennes de vendre leurs produits aux États-Unis

Facteurs technologiques

Bien qu'elles fassent peu de R-D, les entreprises canadiennes sont très compétentes en matière de fabrication de produits sur commande. Les filiales de multinationales étrangères ont accès à la technologie de leur société mère; quant aux entreprises de propriété canadienne, comme elles doivent supporter des coûts et des risques supplémentaires pour faire de la R-D, elles se tournent généralement à des projets de recherche modestes. Les entreprises de secteur adaptént les innovations venant des États-Unis, car ce pays est leur principal marché d'exportation et les normes techniques américaines sont acceptées au Canada. L'utilisation de commandes électroniques est la continuation de modules plus efficaces continuant d'influer sur la mise au point de nouveaux produits. Dans l'ensemble, cette industrie a fait peu chercher à concevoir sa propre technologie ou à acquérir les plus récentes techniques de pointe.

Canada	9,2	—	9,3	États-Unis	0,0	—	3,7	Japan	3,0	—	4,8	CEE	2,9	—	6,0
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En conséquence de l'adhésion de l'Algérie au GATT, les tarifs douaniers sont maintenant délibérément fixés par rapport à la moyenne mondiale. Les tarifs douaniers sont donc déterminés par la moyenne des tarifs douaniers des autres pays membres de l'Organisation mondiale du commerce. Les tarifs douaniers sont donc déterminés par la moyenne des tarifs douaniers des autres pays membres de l'Organisation mondiale du commerce. Les tarifs douaniers sont donc déterminés par la moyenne des tarifs douaniers des autres pays membres de l'Organisation mondiale du commerce.

Facteurs liés au commerce

Ascenseurs et monte-chargé Ces souss-secrétaires disposent des autorités suivantes : des installations modernes de production qui lui procurent des économies d'échelle satisfaisantes dans la fabrication de compositions d'écelleneté dans la fabrique de compositions d'écelleneté, l'excellente réputation de ses produits en matière de sécurité. un vaste marché de pièces de rechange et de services d'entretien. Bien qu'elles aient intégrée des compositions complexes à leurs machines, les entreprises de ce sous-secrétariat dévorent investir davantage dans la technologie électronique pour rester compétitives. Par ailleurs, elles continuent à mandater de main-d'œuvre qualifiée, ce qui n'ira à leur rendement.

Charots élévateurs industriels et accessoires Ce sous-secteur compte parmi ses atouts : des installations de montage très modernes qui utilisent les méthodes de stockage au moment adéquat ; un excellent savoir-faire dans la conception de certains systèmes élévateurs ; des sources d'approvisionnement stables et compétitives ; l'accès tous les sous-secteurs de cette industrie canadienne, et celui qui a le mieux réussi à trouver des creneaux pour ses produits. La plupart des entreprises sont compétitives sur le marché nord-américain, en particulier dans le domaine des chariots à roues, soit l'incapacité de réaliser suffisamment de groupes populaires de faagon rentable.

À l'exception des grues ordinaires et des grues sous secteur ne fabrique pas de produits standard ce sous secteur n'a pas de domaines comme les grues automobiles et les manipulateurs aériens. À l'évolution survenue dans des domaines comme les grues fabriquants canadiens n'ont pas su s'adapter au marché à recemment atteint. Par ailleurs, certains fabricants canadiens n'ont pas su s'adapter à l'évolution survenue dans des domaines comme les grues automobiles et les manipulateurs aériens.

porteur tous terrains. les grues sur chenilles et les grues hydrauliques sur

appareils servent surtout à la construction et qui ne

hydravliques. Les produits importés sont des

grues lourdes, les grues sur porteur et les grues plan intermédiaire, particulièrement pour les ponts-

de grues et de plates-formes, mais il est compétitif sur le

Ce sous-secteur ne fabrique pas toute la gamme

de grues porteurs de grue, de grues hydrauliques et de plates-formes élévatrices.

véhicules porteurs de grues, de grues hydrauliques envergure se spécialisent dans la construction de grues sur porteur. Les entreprises de moulins

commande comme les ponts-grues et les portiques industrielles et d'appareils plus courants comme les

solides capacités de fabrication de matériel sur

exécutée pour 319 millions de dollars de marchandises

25 entreprises, la plupart de propriété canadienne, a

Ce sous-secteur, qui compte environ

Grues et palans

étrangères bien établies.

internationale, font face à la concurrence de sociétés canadiennes, dont plusieurs sont de calibre

développement. Dans ce demier cas, les entreprises sur commandes ou pour ceux destinés aux pays en

pour les grands systèmes de convoyeurs courus américains à partir de leurs usines canadiennes, sauf

sont pas autorisées à apprivoiser le marché

canadiennes de multinationales américaines ne

à servir une région bien déterminée. Les filiales

un service après-vente, les entreprises ont tendance

dans ce sous-secteur. Comme elles doivent offrir

Le commerce extérieur n'est pas important

mines et les ports, le sont moins.

maintenance en vrac, comme ceux utilisés dans les

sont très en demande; par contre, les appareils de industriel et d'autres industries du secteur secondaire,

utilisées dans l'industrie automobile, l'entrepôtage

appareils de maintenance à l'unité, comme eux

sont les appareils de maintenance en vrac. Depuis peu, les

Ce sous-secteur se subdivise en 2 segments,

matériel d'un point à un autre sans perte de temps.

role primordial, car ces appareils doivent déplacer du

grands compétences en systématique de la part du

constructeur comme du client. La qualité joue un

environ 65 entreprises, les plus importantes

En 1986, ce sous-secteur, qui regroupe

convoyeurs et matériel de maintenance

et une marge bénéficiaire brute de 19,1 p. 100. Les importations correspontant à 5,3 p. 100 des ventes rentable, affichant des bénéfices nets moyens après bien. En 1986 et en 1987, elle a généralement été dans l'ensemble, cette industrie se porte

leurs exportations, améliorant leur rentabilité et augmentant

d'ingénierie et dotées d'un mandat de production d'entreprises chargées de commercialisation et

et Hamischefger (grues). Les filiales de sociétés

Canadiennes Ltd. et Hyster (chariots élévatifs industriels) Inc. (ascenseurs et monte-chariot), Caterpillar of

parmi les plus importantes, mentionnons Ots Canada

entreprises ont mis fin à leurs activités au Canada.

Depuis le début des années 80, plusieurs

ordinairement et à l'automatisation de la production.

moment adéquat, à la conception assistée par leurs coûts grâce à la méthode du stockage au

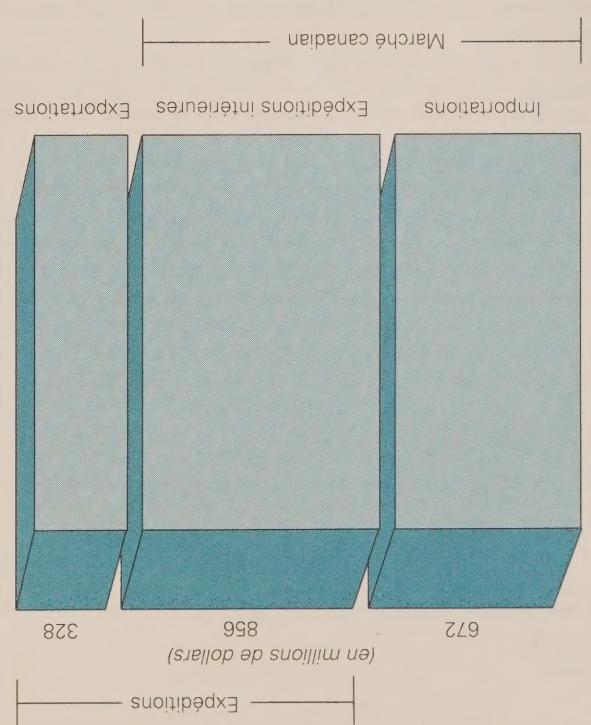
que parmi les ouvriers. En outre, elles ont réduit

procédé à des licenciements tandis parmi les cadres

La plupart des entreprises de ce secteur ont

* Estimations.

1986 - Importations, exportations et expéditions



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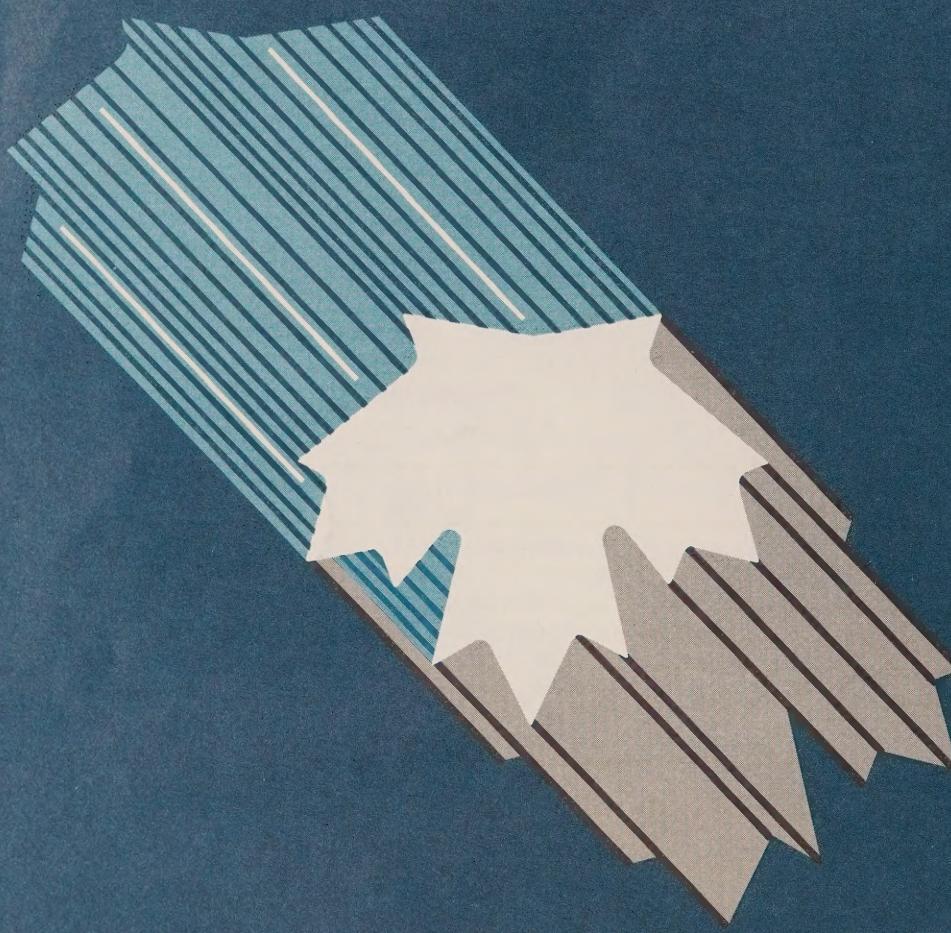
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Matériel de manutention

Industry, Science et Technologie Canada
Technologie Canada



DE L'INDUSTRIE

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